



Post-Event Summary Report

Name of Event:	Texas White House Conference on Aging: Capitol Symposium		
Date of Event:	April 1, 2005		
Location of Event:	Texas State Capitol, Austin, TX		
Number of Persons attending:	111		
Sponsoring Organization(s):	Governor Rick Perry; Senator Kim Brimer, Representative Suzanna Hupp, the Texas Department of Aging and Disabilities Services (DADS), the United Ways of Texas, and the Aging Texas Well Advisory Committee.		
Contact Name:	Karl Urban, DADS Center for Policy and Innovation		
Telephone Number:	512-438-4347	Email:	Karl.Urban@dads.state.tx.us

Priority Issue #1:	Planning Along the Life Span
Panelist: Ann S. Fuelberg, Executive Director, Employees Retirement System of Texas Financial planning for retirement is essential. Twenty-nine percent of Americans say they have not saved for retirement. Sixty-one percent of them say they have not calculated how much money they will need to save by the time they retire. Specifically for Texas, nearly 20% of older Texans feel unprepared to meet their future financial needs.	
Barriers:	Lack of early planning, saving, and calculating health care needs.
Without employer-sponsored health benefits, the average 65-year-old couple will need nearly \$200,000 to cover their medical costs for twenty years. Less than 4% of Texas' state employees subscribe to the state's long-term care insurance program, and 80% of all employees age 45 and older have given little or no thought to how they would pay for their retiree health costs. The rate of personal saving in the U.S. is at an all-time historic low, declining by nearly half since 1970.	
Proposed Solutions(s):	Policies that support individual planning.
Texas should join the nation in supporting policies that: <ul style="list-style-type: none"> ▪ Bridge the gap between income and expenses; ▪ Encourage earlier savings; ▪ Include financial education in curriculums at earlier ages; and, ▪ Encourage individuals to discuss their financial planning needs with a financial advisor. 	

Priority Issue #2:	The Workplace of the Future
<p>Panelist: Willie Taylor, Executive Director, Permian Basin Workforce Development Board</p> <p>By 2010 15% of the Texas population will be over 60. The demand for workforce development services for older workers will increase substantially in the near future. Texas can no longer embrace a “one-size-fits-all” philosophy in serving its workers; new approaches are needed to serve older workers in peer groups designed to address their unique needs. At issue is whether or not the current system is geared to provide the appropriate types of services older workers require, and whether or not the state can accommodate the increased number of older job seekers.</p>	
Barriers:	Lack of training to prepare for the impact of an aging workforce.
<p>The Texas Workforce Commission, local Workforce Development Boards, and their partner agencies and organizations need to collectively recognize the impact of an aging workforce. They should continue to work together to develop policies that promote the value of training older employers and ensure equal access to training. Training programs should be developed and specifically aimed at increasing the skills of older workers. Finally, continuous education should be available to employers so they can begin to re-engineer their hiring processes.</p>	
Proposed Solutions(s):	New Strategies for “R³”
<p>Texas must employ new and creative strategies that simultaneously address recruitment, retention and retraining of its growing older workforce. For example, with regard to recruitment, effective use can be made of the fact that individuals over 50 years old are the fastest growing group of internet users and there are an increasing number of websites aimed at employment opportunities. In efforts to improve retention, research suggests that older workers will want to continue working if the work is interesting and challenging, and has flexible hours per week with acceptable compensation packages. Research also shows that effective retraining is directly linked to older workers and their productivity. Texas must profile the adult learner and stay ahead in the market by requiring all our employers, including older workers, to actively learn new technologies and skills.</p>	
Priority Issue #3:	Our Community
<p>Panelists: Judith L. Warren, Associate Director for Human Services, Texas Cooperative Extension, Texas A&M University System (TAMU), Tim Carter, President/CEO, United Way of Metropolitan Tarrant County.</p> <p>Aging our citizens “well” is vital to a successful approach in building community capacity across Texas. During the last several years, the United Ways of Texas, through their <i>Community Forums</i>, and the Texas area agencies on aging, in partnership with TAMU, Cornell University, the state demographer and DADS, have engaged in a series of local processes to identify the critical issues that impact both the aging population and Texas communities’ response to this impact. The critical issues identified so far range from concern about individual financial security, housing, transportation, and family structure, to issues related to caregiving, grandparents raising grandchildren, and health and longevity.</p>	
Barriers:	Economic disparity between population segments and between rural and urban areas.
<p>A leading indicator of family hardship in Texas is not unemployment, but the two-thirds of working poor families who have no health insurance. This disparity continues to grow, affecting health and quality of life outcomes. Another issue compounding this is the fact that high percentages of elders continue to live in rural areas, while boomers and the younger populations migrate to urban areas. This results in many regions in Texas facing key barriers, related to: (1) economic development (including work and volunteer issues and building careers for an aging society); (2) independent living (including chronic health conditions and a lack of housing); and, (3) elder care—both formal and informal—and the challenges associated with family caregiving.</p>	

Proposed Solutions(s):	<i>Aging Texas Well</i> is critical to state and community action.
Public policies and local initiatives are needed which reward disease prevention and foster eldercare solutions. The Aging Texas Well initiative is an important endeavor and it must be embraced and supported by Texas communities and the state leadership. The initiative envisions that all older Texans will have culturally-appropriate information and opportunities to: (1) achieve and maintain the best possible physical, mental, and spiritual health; (2) be as socially engaged as desired; and, (3) prepare financially and legally for major life decisions.	
Priority Issue #4:	Health and Long-Term Living
Panelist: Jane Bavineau, Executive Director, Care for Elders, Houston, TX The key issues facing health and long-term living in Texas are like those of the rest of the nation: <ul style="list-style-type: none"> ▪ Management of health and chronic disease—80% of older adults have at least one chronic condition; ▪ Continued challenges related to the access to, availability, affordability and quality of services; ▪ System issues, such as fragmentation and no single point of entry to services; ▪ Provider issues, such as lack of culturally sensitive and competent staff; and, ▪ Consumer issues, such as lack of awareness about services and inability to acknowledge the need for help. 	
Barriers:	Making Services and Support “Elder Friendly”
Key barriers affecting these issues include: (1) meeting basic needs for housing and security; (2) maintaining individual physical and mental well-being; (3) guarding independence for the frail, disabled, and homebound; and (4) ensuring opportunities for social and civic engagement.	
Proposed Solutions(s):	Evidence-based health promotion programs and improving access to services and supports.
Texas is testing the use of evidence-based health promotion programs funded by the Administration on Aging. These programs are showing promising results and should be expanded. Additionally, improving access to services and supports should be a priority strategy at the state and local levels. Communities should work to build formal linkages among community-based organizations; linkages that start with and are underpinned by the Texas 2-1-1 system. These efforts should be supported by experts and specialists, including area agencies on aging, and every local system should be prepared to provide: (1) information and referral; (2) telephone and in-person case management; and, (3) field specialists. Local communities need to plan and prepare to be aging friendly; the Aging Texas Well website provides useful tools and information.	
Priority Issue #5:	Social Engagement
Panelist: Beau Egert, Director of Faith-based and Community Initiatives, Texas OneStar Foundation Older adults who engage in social activities are more likely to remain mentally and physically stimulated, thereby maintaining better overall health and quality of life. It is imperative that older Texans have opportunities to be and remain involved in their communities, including volunteerism, philanthropy, political, civic and religious involvement and informal social interactions, such as time spent with friends and neighbors.	
Barriers:	Lack of social engagement by the baby-boom generation.
Over the last 40 years, America has experienced a radical decline in civic and social engagement and almost all studies show that the baby-boom generation is substantially less involved in their communities than their parents of the WWII generation. Much of this decline can be attributed to such things as	

electronic and technological changes, disruption of marriage and family ties, and the stresses of two-career families. We must overcome these barriers and turn the tide as the first of the baby boomers are entering retirement.	
Proposed Solutions(s):	Challenge the baby boom generation to begin a “renewal of community”.
With an important role to be played by faith-based organizations, we should urge baby boomers to reach out proactively—seeking out the child from a fatherless home, seeking out the single parents who need assistance, and generally assisting all those in need. In return, we should urge our younger generation to care for their parents, grandparents and neighbors as they age and face increasing health concerns, loneliness and isolation.	
Priority Issue #6:	Marketplace
Panelist: Camille Keith, Vice President, Southwest Airlines Depending on the year, tourism is the second or third largest industry in Texas and it ranks third in the nation. It is an industry that hires people of every age to do every job and seeks to provide career growth opportunities and retirement benefits. The tourism industry significantly impacts both the economy of and employment in Texas. Since tourism (and all the businesses and jobs it encompasses) affects so many citizens in our state, it is vital that we grow each facet of the industry to not only benefit our economy, but also to effectively address issues such as those being faced by caregivers, the lack of financial planning by baby boomers, and a variety of challenges relating to volunteering and mentoring, especially within in our schools. As baby boomers age, the Texas tourism industry (as well as all businesses) must understand and value their individuality, youth, optimism, determinism, and social activism. If we are to succeed, it is extremely important for marketers to understand boomers’ attitudes and desires. Boomers account for 50% of consumer demand, at least 70% of the household net worth, and they are extremely mobile, for both professional and recreational reasons.	
Barriers:	Effective use of a major industry to market healthy initiatives and opportunities to aging boomers.
At the same time, as pointed out in the issues above, boomers have not engaged very well in early planning for their future, they have little savings and have not calculated the costs of their future long-term care needs. Woman baby boomers, our most significant informal caregiving resource, are juggling career opportunities while trying to care for aging parents and their own children and families. Communities and schools need the help of volunteers to meet their growing needs and aging boomers need to be able to find and the motivation to fulfill these roles. Industries and businesses must find ways to address these issues and offer products and services that can accommodate the baby boomer consumer.	
Proposed Solutions(s):	Promote marketplace techniques that encourage baby boomers to be prepared, and that encourage them to remain active and involved in all aspects of their lives.

Marketers use many techniques in targeting consumers, including demographics, psychographics, and product usage behaviors. Baby boomers are the largest demographic segment the marketplace has ever faced. This presents excellent opportunities to influence a large portion of the population to “age well”. For example, Southwest Airlines has a program called “Freedom to Earn”, mirrored after its “Freedom to Fly” program. It teaches SWA employees the mechanics and benefits of financial planning. Business must also address the concept of “one-stop-shopping” for a generation of consumers that is juggling both work and caregiving. Encouraging employees to sign up for volunteering and mentoring—with flexibility for busy schedules—is also an important strategy. If the baby-boomers can be influenced, through industries, products and services, that their lives are just beginning as they head toward retirement, we have a better chance to mold a healthier, more productive and more prepared generation of older citizens.